

Egypt's Imports of Coarse Grains, Oilseeds, and Oilseed Meals

A close look at Egypt's feed availability and nutritional requirements reveal substantial supply shortages of major feed items, especially those providing high energy and crude protein. During 1989-2000, Egypt's total feedstuff imports rose from 1.71 million tons to 6.66 million tons—from \$270.5 million to \$797.8 million in nominal value terms (table 12). In volume terms, 92-95 percent of total feed imports were classified under three categories: coarse grains, oilseeds, and oilseed meals (table 13). Of this total, 76 percent were coarse grains, 16 percent oilseed meals, and 3.5 percent oilseeds in 2000 (fig.17).

Coarse Grain Imports Rise Steadily

Coarse grains constituted the largest share of Egypt's total feedstuff imports, increasing from 1.39 million tons in 1989 to 5.05 million in 2000. Imports of yellow corn were the largest, fluctuating between 98 and 100 percent of total coarse grain imports during 1989-2000. The remaining 2 percent included barley, sorghum, and rye. Yellow corn imports rose from 1.36 million tons in 1989 to 5 million tons in 2000, ranking Egypt as the world's fourth-largest corn market, after Japan, Mexico, and Taiwan. Egypt imports corn mainly from the United States and Argentina. However, due to its high quality, U.S. corn dominated in all years from 1989 to 2000, ranging from a maximum of 92 percent in 1990 to a minimum of 60 percent in 1998 of all corn imported by Egypt. In 2000, the United States was the largest exporter of yellow corn to Egypt, accounting for 76 percent of total Egyptian imports (table 14). According to the most recent data, exports of U.S. yellow corn to Egypt nearly quadrupled from 1.07 million tons in 1989 to 4.2 million tons in 2001 [43].

Oilseed Imports Grow Rapidly

Egypt's total oilseed imports rose from 38,400 tons in 1989 to 235,000 tons in 2000, growing at 29.7 percent annually. In 1989, all of Egypt's oilseed imports were soybeans. This share decreased to 83 percent in 2000, with other oilseed imports including 27,400 tons of linseed and 5,570 tons of sunflower seed. In 1989, all of Egypt's soybean imports were shipped from the United States. However, due to competition from Argentina, U.S. shipments declined to 50 percent in 1993, and 21 percent in 1998, but increased steadily to 70 percent in 2000 [11]. U.S. soybean prices are usually competitive during August-January, while Southern

Hemisphere suppliers, such as Argentina and Brazil, are more competitive during February-July.

Rapid growth in soybean imports (over fivefold) was mainly due to the recent development of crushing capacity in the private sector. Due to a lack of crushing facilities, Egypt tended to import soybean meals ready for feeding, a situation that will change after the completion of two new private crushing facilities in Alexandria and in Damiatta, which will depend totally on imports. The two plants are under construction but have run into substantial delays and are not expected to become operational in the near future [11].

In 2000, Egypt imported small amounts of linseed (27,400 tons) from Canada and sunflower seed (5,400 tons) from the Russian Federation.

Oilseed Meal Imports Grow Strongly

Egypt's total oilseed meal imports rose from 189,300 tons in 1989 to 1,025,000 tons in 2000, an annual growth rate of 15.2 percent. These imports were composed totally of soybean meal, except in 1996, when Egypt's total oilseed meal imports were 84 percent soybean meal and 11 percent sunflower. Most of the rest was cottonseed meal. In 1989 and 1990, the United States was the largest exporter of soybean meal to Egypt, accounting for 86 and 74 percent of total imports, respectively. However, this share declined sharply to 24 percent in 2000, due to competition from Argentina and Brazil. In 1991, Argentina entered the market for the first time, taking a 34-percent market share, ranking second after the U.S. share of 45 percent, and exceeding Brazil's 21-percent share. Argentina's share increased to 76 percent in 2000, while the U.S. share was 24 percent, and Brazil's was only 0.5 percent.

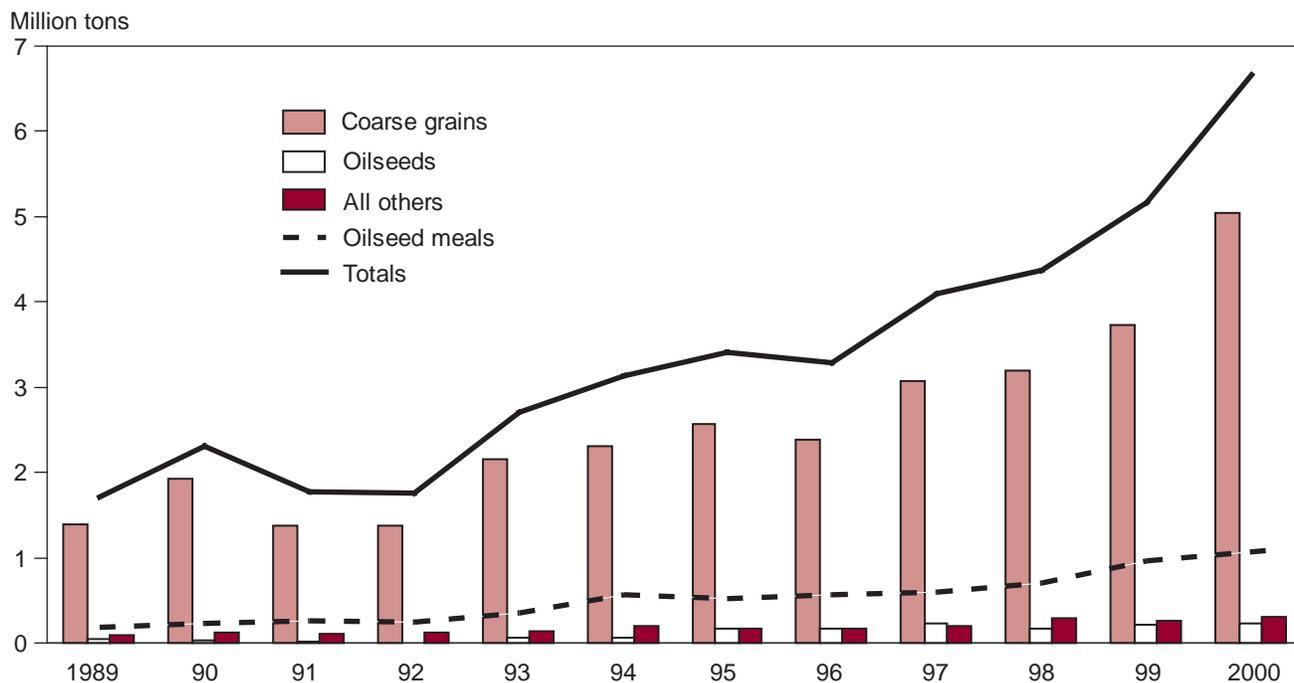
Egypt's imports of sunflower meal were erratic, fluctuating from 1,000 tons from Greece in 1992, 4,000 tons from the United States in 1995, and 4,000 tons from Romania in 1998, to 62,300 tons from Argentina in 1996, and 18,100 tons from Argentina in 2000. Other oilseed meal imported into Egypt included 23,800 tons of cottonseed meal from China in 2000.

Table 12—Egypt's imports of feedstuffs from the world by value, 1989-2000

Commodity - (SITC code)	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
	<i>Million \$</i>											
Coarse grains (0430-04729)	169.0	217.1	146.4	144.7	230.9	247.8	304.7	383.7	366.6	324.4	347.5	459.5
Oilcakes (01831-08139)	46.9	44.0	47.7	44.5	66.6	101.9	82.3	125.7	159.4	113.5	133.9	188.0
Oilseeds (2222-2237)	12.3	11.6	4.9	2.2	19.6	17.1	62.7	54.4	82.0	67.7	55.8	49.4
Prepared animal food, nes. (08199)	31.4	32.5	28.8	29.8	30.0	35.9	39.3	35.3	38.3	56.7	34.4	43.2
Flr. etc .meat, off. an. feed (08141)	7.6	7.3	8.3	11.3	12.2	16.9	18.4	21.5	25.3	34.9	14.6	19.5
Residue, mfg.starch (08151)	0.8	2.3	0	0.8	0	0	0	1.8	0	5.1	4.5	16.5
Flr. etc. fish, animal feed (08142)	2.4	2.3	3.2	2.6	3.7	4.5	3.8	5.3	4.3	9.8	23.7	15.4
Fodder roots, forage,etc. (08113)	0.3	0.3	0.5	1.1	1.8	0.1	0.2	0.3	0.6	0.7	1.9	3.4
Brans (8123-8126)	0	0	0	0.1	0	3.4	0	0	2	2.4	5.6	2.9
Lucerne (alfalfa) (08112)	0	0	0	0	0.4	0.3	0	0	0	0.5	0	0.1
Cereal straw, husks, unprd. (08111)	0	0	0	0	0	0	0	0	0	0	0.1	0
Vegetable residues etc. (08119)	0	0	0	0.5	0	0	0	0	0.1	0	0	0
All others	42.4	44.8	40.9	46.2	48.1	61.2	61.7	64.2	70.7	110.2	84.9	100.9
Totals	270.5	317.5	239.9	237.6	365.3	428.0	511.4	628.1	678.7	615.7	622.2	797.8
Total coarse grains,oilseeds, and meals	228.1	272.7	199.1	191.4	317.1	366.8	449.7	563.8	607.9	505.5	537.2	696.9
	<i>Percent</i>											
Share of coarse-grains, oilseeds, and meals	84.3	85.9	83.0	80.6	86.8	85.7	87.9	89.8	89.6	82.1	86.3	87.4

Source: United Nations Statistics Division, Website <http://intranetapps.fas.usda.gov/untrade/June 2002>

Figure 17
Egypt's total feed imports, 1989-2000



Source: Economic Research Service/USDA.

Table 13—Egypt's imports of feedstuffs from the world by volume, 1989-2000

Commodity - (SITC code)	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
	<i>1,000 tons</i>											
Coarse grains (04730-04729)	1,388.2	1,928.7	1,380.9	1,382.0	2,157.7	2,308.3	2,561.5	2,387.4	3,070.3	3,192.7	3,732.1	5,050.5
Oilcakes (01831-08139)	189.3	230.4	263.1	242.2	348.6	562.3	512.3	563.6	595.8	704.7	958.9	1,067.20
Oilseeds (2222-2237)	38.4	29.7	18.9	0.9	66.2	65.7	166.9	167.1	234.7	174.7	217.8	235.0
Prepared animal food, nes. (08199)	68.7	75.0	75.7	78.5	77.9	92.1	94.7	82.0	88.1	123.4	80.4	103.0
Flr. etc. meat, off. an. feed (08141)	18.9	23.3	26.9	35.9	40.4	53.9	59.7	65.9	72.7	97.5	53.6	63.3
Residue, mfg. starch (08151)	2.5	21.1	0	2.7	0	0	0	5.2	0	15.2	20.5	57.7
Brans (8123-8126)	0	0	0	1.2	0	39.1	0.1	0	24.0	38.8	56.5	40.9
Flr. etc. fish, animal feed (08142)	4.4	4.4	5.7	4.2	6.4	8.6	6.5	7.9	6.3	13.3	41.9	29.7
Fodder roots, forage, etc (08113)	1.1	1.3	1.9	3.8	8.1	0.4	0.7	1.0	3.2	2.6	6.5	16.0
Lucerne (alfalfa) (08112)	0	0	0	0	1.4	0.9	0	0	0	2.4	0	0.4
Cereal straw, husks, unprd. (08111)	0	0	0	0	0	0	0	0	0	0	1.5	0
Vegetable residues etc. (08119)	0	0	0	3.1	0	0.2	0.2	0.1	0.2	0.3	0	0
All other feedstuffs	95.6	125.1	110.2	129.4	134.3	195.3	161.8	162.2	194.5	293.5	261.0	311.0
Totals	1,711.5	2,313.9	1,773.1	1,754.5	2,706.8	3,131.6	3,402.5	3,280.3	4,095.3	4,365.7	5,169.8	6,663.7
Total coarse grains, oilseeds, and meals	1,615.9	2,188.8	1,662.9	1,625.1	2,572.5	2,936.3	3,240.7	3,118.1	3,900.8	4,072.2	4,908.8	6,352.7
	<i>Percent</i>											
Share of coarse grains, oilseeds, and meals	94.4	94.6	93.8	92.6	95.0	93.8	95.2	95.1	95.3	93.3	95.0	95.3

Source: United Nations Statistics Division, Website <http://intranetapps.fas.usda.gov/untrade/June 2002>

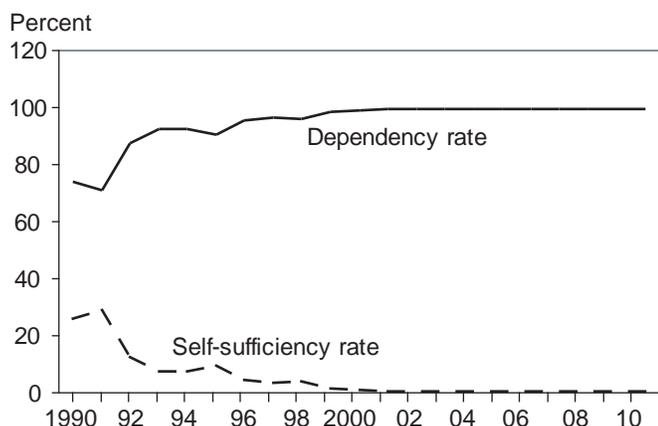
Egypt's Dependency on Feed Imports Rising

This report's assessment of Egypt's increasing dependence on world markets during the 1990s focuses only on yellow corn, soybeans, and soybean meals. Egypt imports both soybeans and soybean meal. Almost all soybean imports are crushed to produce soybean meal and soybean oil, and only a few thousand tons are used to produce other food items. Thus, meal is converted into soybean-equivalent so that both imports can be related to domestic production to measure import dependency rates. Measuring the dependency rate this way assumes constant stock levels and negligible export volumes, assumptions that are realistic for Egypt. Results show that the soybean and meal

equivalent import dependency rate has substantially increased from 74 percent in 1990 to 99 percent in 2000, indicating only a 1 percent self-sufficiency (SS) rate for Egypt (fig. 18a). This is mainly due to rapidly declining domestic production and increasing demand for soybean meals to expand domestic poultry and other livestock production. Using USDA's Baseline, Egypt's soybean-equivalent import dependency rate will continue to increase to an estimated 99.6 percent in 2010 (fig. 18a).

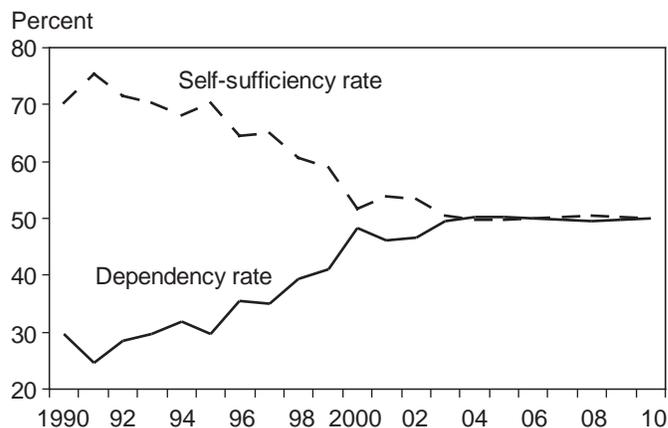
In the case of corn, Egypt's import dependency rate is much lower, 48.3 percent in 2000, but still substantially up from 29.7 percent in 1990. The corn dependency rate is forecast to rise to 50.1 percent in 2010 (fig. 18b).

Figure 18a

Egypt's soybean and meal equivalent dependency rate; 1990-2000 historical data, 2001-2010 forecast


Source: Economic Research Service/USDA.

Figure 18b

Egypt's corn import dependency rate; 1990-2000 historical data, 2001-2010 forecast


Source: Economic Research Service/USDA.

Table 14—Egypt imports of major poultry feeds from the world and the United States, 1989-2000

Year	Imports from the world			Imports from the United States			U.S. share of the Egyptian markets			
	Corn	Soybean meal	Soybeans	Corn	Soybean meal	Soybeans	Corn	Soybean meal	Soybeans	
		<i>1,000 tons</i>			<i>1,000 tons</i>		<i>Percent</i>			
1989	1,358	189	38.5	1,067	162.9	38.4	79	86	100	
1990	1,927	230	24.8	1,774	171.5	24.8	92	74	100	
1991	1,260	263	0	1,072	118.6	0	85	45	0	
1992	1,382	242	0	1,019	46.5	0	74	19	0	
1993	2,147	348	63.0	1,909	120.6	31.5	89	35	50	
1994	2,255	559	58.1	1,601	142.0	18.7	71	25	32	
1995	2,511	509	107.4	2,267	147.3	77.7	90	29	72	
1996	2,359	475	138.9	1,987	62.2	113.4	84	13	82	
1997	3,059	596	121.6	2,167	162.9	52.1	71	27	43	
1998	3,187	699	91.8	1,917	151.5	19.3	60	22	21	
1999	3,731	959	174.8	3,092	102.0	100.5	83	11	57	
2000	5,003	1,025	194.2	3,780	243.7	135.0	76	24	70	
					<i>Percent</i>					
Annual growth rate	10.9	15.2	50.6	9.5	2.0	83.2	-1.4	-13.2	32.6	
(t-value)	7.88	13.02	2.0	4.95	0.51	1.52	-1.37	-3.78	1.11	

Source: United Nations Statistics Division, Website <http://intranetapps.fas.usda.gov/untrade/June 2002>.

Table 15—Egypt's soybean production, imports, and forecast poultry feed requirements, 2000-2010

Year	ERS Baseline forecast					Forecast derived soybean demand for meat and eggs		
	Soybeans		Soymeals		Total consumption (soybean-equivalent)	Scenario I	Scenario II	Scenario III
	Production	Imports	Imports	Soybean equivalent				
	<i>1,000 tons</i>					Soybean- equivalent		
2000	16	334	1,040	1,316	1,666	889	889	889
2001	9.8	495.2	1,146	1,451	1,956	912	922	924
2002	8.4	595.2	1,335	1,690	2,294	946	966	971
2003	10.6	595.8	1,414	1,789	2,396	985	1,015	1,023
2004	10.4	620.8	1,460	1,847	2,479	1,028	1,071	1,083
2005	10.3	646.2	1,489	1,885	2,542	1,075	1,132	1,147
2006	10.3	669.7	1,508	1,909	2,589	1,124	1,195	1,214
2007	10.3	693.1	1,517	1,920	2,623	1,176	1,262	1,285
2008	10.3	715.2	1,532	1,939	2,664	1,228	1,332	1,361
2009	10.3	733.8	1,558	1,972	2,716	1,284	1,407	1,441
2010	10.3	752.2	1,573	1,991	2,753	1,341	1,485	1,525

Source: Production and import forecast data are quoted from ERS-Baseline (44).

Table 16—Egypt's corn production, imports, and forecast poultry feed requirements, 2000-2010

Year	ERS baseline forecast			Forecast		
	Production	Imports	Totals	Scenario I	Scenario II	Scenario III
	<i>1,000 tons</i>					
C2000	5,650	4,700	10,350	2,457	2,457	2,457
2001	5,638	5,100	10,738	2,523	2,548	2,555
2002	5,957	5,100	11,057	2,617	2,670	2,684
2003	6,106	5,133	11,239	2,722	2,807	2,829
2004	6,308	5,440	11,748	2,843	2,961	2,993
2005	6,432	5,735	12,167	2,974	3,129	3,171
2006	6,551	6,021	12,572	3,108	3,304	3,357
2007	6,642	6,405	13,047	3,252	3,489	3,554
2008	6,791	6,823	13,614	3,396	3,684	3,764
2009	6,912	7,212	14,124	3,550	3,890	3,985
2010	7,077	7,509	14,586	3,709	4,106	4,217

Source: FAO Data, <http://faostat.fao.org/August 2002>